Academic Rehired Retiree Process

The policy and guidelines can be found on the Illinois Human Resources website at http://humanresources.illinois.edu/retirees/re-employment.html.

No service by a SURS annuitant or U of I retiree can be allowed in advance of required approvals.

RR requests should be submitted as soon as possible prior to the start of the appointment, but preferably a minimum of at least one month in advance of the start to help prevent delays in the approval and start of the appointment. For newly hired retirees, we recommend the request be submitted two months in advance in order to allow for the approvals and background check to be processed prior to the start of the appointment.

Academic retirees are limited to working up to an equivalent FTE of .50 no matter what plan they retired from.

Units need to keep track of the hours worked so as not to violate the policy and potentially create a PPACA issue as well as monitor the Rehired Retiree Progress Report to lessen the chance of a retiree becoming an Affected Annuitant.

Discussions about post-retirement employment may not begin until after retirement. If at the time of retirement, the retiree is planning to come back to work post-retirement, SURS and/or the IRS may consider the retirement invalid.

SURS Annuitants –

- are not allowed to return to work (including on a volunteer basis) until the 61st day post-retirement.
- are limited to working up to an equivalent FTE of .50.
- are limited to earning up to 40% of their Highest Annual Earnings (HAE) calculated by SURS on non-exempt funds. If a retiree is close to the 40% HAE, a Close to Affected letter will be needed. Exempt funds are unlimited, however, units must still keep in mind the personal earnings limitation of the retiree.
- may be subject to a monthly earnings limit or annual earnings limit which may be less than the 40% HAE. The retirees are provided this information from SURS and must provide the information to the unit.

Self-Managed Plan Retirees or Retirees who took a Lump Sum Payment of their SURS contributions -

- do not have to wait 60 days before returning to employment at a SURS covered institution.
- are limited to working up to an equivalent FTE of .50.
- do not have a Highest Annual Earnings limitation.
- do not have an earnings limitation.

General Information:

- The rate of pay and FTE should be related to the duties being performed.
- Units must rely on the retiree to provide the personal earnings limitation (whether it be a monthly or annual limitation).
- If the service date(s) change after the RR Request form has been fully approved, units should contact ahr-rr@illinois.edu requesting the date(s) be changed on the form. The dates on the RR Request form and the dates entered in HRFE need to match.
- If Emeritus/Emerita status has not yet been granted by the BOT for a faculty member, they must be rehired as a Visiting Professor (with appropriate rank) and a search waiver will be required.

Common Mistakes on the RR Request:

Section 2 –

- SURS Affected Annuitant – marked 'Yes' when the retiree is not an Affected Annuitant
- First Rehire Date – this needs to be the date the retiree was first rehired as a retiree, even if there has been a separation after the initial rehire.
- SURS Highest Annual Earnings – does not match the HAE amount on Statement of SURS Annuity Status Form. Units enter the SURS annual gross annuity amount incorrectly.

Section 3 –

- Ensure pre-retirement title is entered correctly.
- No Department or College name entered.
- Separation Date is incorrect.
- If given Emeritus/Emerita status, the full title should be entered
- If given Emeritus/Emerita status, the date the status was effective should be entered. The unit should have a copy of the approved BOT item showing the effective date. If not, the information can be searched for on the BOT Agenda and Meetings site.

Section 4 –

- Job title – If the individual was granted Emeritus/Emerita status, that title should be used. If paying on an hourly basis, the title should be the Emeritus/Emerita with (HA) after. For academic hourly appointments, the title should be Academic Hourly (no classification needed).
- Service Begin Date – must be within the SURS year in which the appointment falls (9/1/XX – 8/31/XX) unless the appointment is for teaching. If teaching, the date should reflect the period of teaching (fall semester, spring semester, or full academic year). For teaching fall semester, the service begin date should reflect 8/16/XX.
- Service End Date – cannot be later than 8/31/XX.
- Is Appointment paid 9/12 – for those retirees providing service for the full academic year, they must be paid 9/12.
- Appointment FTE – cannot be greater than .50. Should also be calculated based on previous service as a non-retired employee providing the services are similar
- Equivalent FTE – cannot be greater than .50 for academic hourlies. May need to adjust the total gross amount or date of service to bring the FTE within the .50 (for academic hourly appointments)
- Rate of Pay – needs to reflect the 1/12th rate for employees paid 9/12. Should reflect the monthly rate based on the service dates.
- Total Gross Pay – can be a set amount for a course or specific service as agreed upon and offered. If a specific amount needs to be paid and the dates are other than full months, the unit is responsible for calculating the adjusted monthly amount. Cannot reflect an increase from pre-retirement appointments or previous retiree appointments unless the University has a salary program.
- Funding and Labor Distribution – if paying on State funds, be sure the FUND reflects the correct fiscal year.

Proposed Appointment Category:

- For anyone hired to teach, the Retired faculty re-employed to teach courses… should be checked.
- Anyone hired to do research, even if not paid on research funds (although that should be rare), should have the Retired faculty or staff re-employed to conduct research option checked.
- For academic hourly appointments hired to do research, both the Retiree re-employed in an hourly academic/research/faculty/clinical capacity and Retired faculty or staff re-employed to conduct research options should be checked.

Proposed Job Description –

- The duties can either be listed in the RR request form or a job description attached.

Justification for Request:

Must answer all three questions:

- Describe the critical nature of this position/hire to achieving the unit's strategic goals.
- Confirm the hire will not create a budget deficit.
- Verify there is no other way to allocate duties to complete the work associated with this position (basically, we are looking for why it is necessary to hire a retiree vs. having a current faculty or staff member perform the duties).

Approval to Reappoint Sought Via the Following Employment Procedures:

- Hire exempt from search process per campus office for diversity, access, and equal opportunity – should only be checked if the retiree has the status of Emerius/Emerita.
- Retiree selected as a result of an open search – checked if a search was conducted. Attach the search approval email in the RR request.
- Waiver of search with appropriate rationale – to be checked for those employees for whom a search waiver was granted or for academic hourly appointments for which the Academic Hourly Appointment form was processed. The search waiver approval email or the Academic Hourly Appointment form should be attached in the RR request.

General Comments –

Comments are always helpful especially to indicate a special amount of money to be paid, or any other information that will be helpful in explaining any special circumstances. If the RR Request is being submitted within two weeks of the start date, an explanation for the delay in the submission should be provided in the comments.

Approvals –

Be sure the RR request is routed through the appropriate levels.

Common Mistakes on the Statement of SURS Annuity Status form:

- Only the retiree should be completing the Statement of SURS Annuity Status form.
- Make sure the most recent form is completed (currently dated 4/6/15)

1 –

- Make sure the name is listed.
- The retiree must enter/select the Employer from which they retired (a drop down is provided when using the form from the Illinois Human Resources website.

2 –

- If the retiree checks they retired from the Self-Managed Plan or took a lump sum payment of their SURS contributions, they only need to answer question #9, sign and date the form.
- If the retiree checks they are receiving a monthly annuity they must complete the rest of the form.

3 -

- The retiree must enter their current SURS annual gross annuity amount (if receiving an annuity from SURS).

4 –

- The retiree must enter their UIN if they retired from the University of Illinois (if receiving an annuity from SURS).

5 –

- No information is entered by the retiree. They just need to read the information as a reminder of their earnings limitations and impact of exceeding that limitation (if receiving an annuity from SURS).

6 –

- The retiree must enter their Highest Annual Earnings as provided by SURS (if receiving an annuity from SURS). Be sure this is not the same figure as their gross annual annuity they entered in question 3.

7 –

- The retiree only needs to enter any/all appointments they hold/will hold within the SURS year in which their appointment falls, including month/day/year (if receiving an annuity from SURS). We do not need appointments held in a SURS year outside the appointment year being requested. Example:

University of Illinois	9/1/16-8/31/17	$12,000	Yes or No (as appropriate)
Illinois State University	11/1/16-5/31/17	$10,000	Yes or No (as appropriate)
University of Illinois	1/1/17-5/15/17	$12,000	Yes or No (as appropriate)

8 –

- The retiree must indicate whether or not they are an affected annuitant (if receiving an annuity from SURS). This is frequently checked 'Yes' in error as they check yes since they are an annuitant and don't read the question or review the definition of an Affected Annuitant. If the retiree is actually an Affected Annuitant, special approval must be obtained from the Provost Office to hire the retiree and the unit must pay the amount associated with hiring an Affected Annuitant.

9 –

- The retiree must check Yes or No as to whether or not they are competent and an adult age 18 or over.

The retiree must print their name, enter the date they signed the form and then sign the form. Note: the Statement of SURS Annuity Status form must be signed no later than 1-2 months of the RR Request form being submitted.

Forms to be attached to the HRFE transaction (depending on the hire):

Approved RR request form (not the email approval) – All
Statement of SURS Annuity Status form – All
Fully signed job description – Academic Hourly
Background Check approval email – New hires and change in employee group
ODEA email approval – Specialized faculty, Academic Professional, Academic Hourly
Accepted Offer Letter – All
I-9 completed in Tracker – Newly hired retirees

5/12/17